

USER'S GUIDE TO THE LIST HANDLER

A File Manager Program for

**The Apple II™ or II Plus™ Computer
With 48K RAM and at Least One Disk Drive**

**SILICON VALLEY SYSTEMS, INC.
1625 El Camino Real, Suite 4
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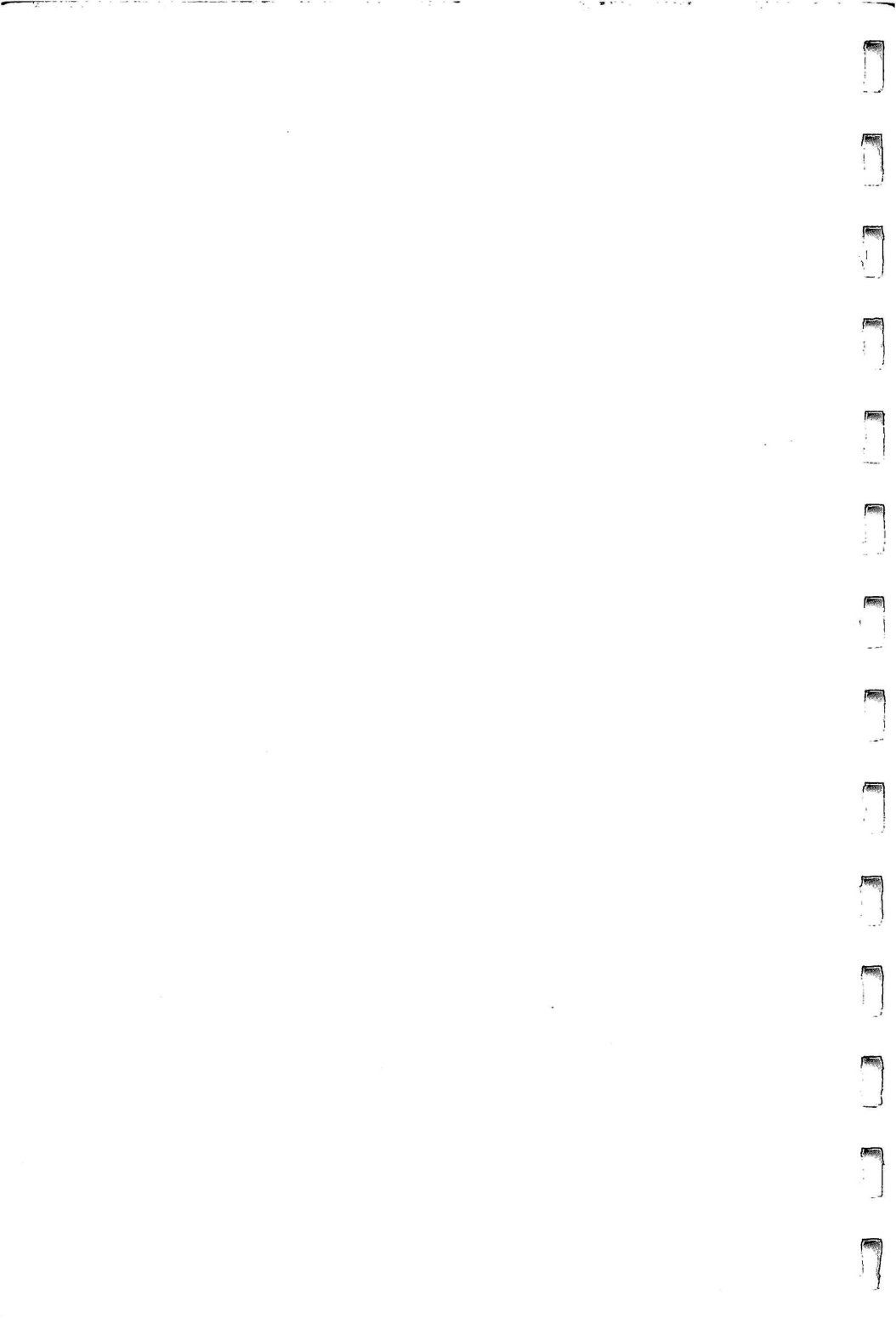


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CHAPTER ONE: INTRODUCTION, AND CREATION OF A LIST

1.0 INTRODUCTION

Welcome to The List Handler™ — the easiest to use, fastest, and most flexible program available for managing large lists of information on the Apple™ computer.

1.1 A brief overview of lists, records, and fields

Together with its companion, List Utility™, List Handler allows the creation of information **lists** (or **files**) that may be made up of many thousands of **records** managed and stored on floppy disks read by Apple disk drives.

A record is made up of **fields** that are selected and named by the user. Each field may contain up to about 200 characters (letters, spaces, numbers and punctuation marks). A record can contain as many as 255 fields (depending on the total number of characters contained in the fields), up to a maximum record size of 4,000 characters. List Handler's maximum record size, number of fields, and field size are unusually large, and allow the user exceptional flexibility in design of lists.

Up to 3,000 records (such as address records) can be stored on a single floppy disk. By contrast, many older programs, such as mailing label programs for use on the Apple, could manage only about 500 or so records on a disk. A mailing label list disk created with List Handler is the equivalent of about 6 disks created by some other programs. This means many business applications requiring manage-

ment of thousands of records can now be done easily with List Handler.

When the size of a list grows beyond the capacity of a single disk, List Utility provides an option for extending the list onto additional disks. For those users with multiple disk drives, List Handler can allow "on line" (simultaneously accessible) *up to 8 drives containing list disks*, for maximum "on line" management of about 24,000 records. But systems with fewer disk drives — even one — can still handle lists that extend onto a number of disks (although at the expense of some of the sorting capabilities of the program). For a wide range of uses, two disk drives are the recommended minimum.

1.2 Searches and sorts — with a few illustrations

List Handler's advanced programming techniques provide exceptional speed of searches using a **selection criterion** and a **sort (order)** of information to be printed out. The List Tutorial (which is included in the program package) contains about 400 records and illustrates the program's capabilities as a mailing label creator. If a mailing label printout is requested, selecting all the records and sorting them in Zip Code order, it takes List Handler about one minute to complete the sort. The program can then drive a high speed printer almost continuously to print the labels. By contrast, many of the older mailing list programs take several hours to print out a sorted set of mailing labels, for a total number of records much smaller than can fit on one list disk. Yet List Handler is much more than a mailing label program!

Screen searches can be made to locate any record or records in a list that meet a selection criterion (which may be a word, a phrase, a character, or a string of characters. Any record called up can then be examined, edited or deleted. For example, a client list can be searched by a client's last name, account number, or other unique selection criterion. The client's record can then be edited to enter the date and results of a sales call, date of payment of an invoice, etc.

Three powerful printing routines are provided. All three printing routines allow both a selection criterion and a sort order for selected fields. **Sorts** can be requested on the contents of a field alphabetically in ascending or descending order, numerically in ascending or

descending order, or chronologically (by date) in ascending or descending order.

In any of the printing modes, the **selection criterion** can operate on the contents of the selected field (which may contain alphabet characters (words or names), numbers, or dates). Eight possible logical relationships can be established between the search criterion and the contents of the specified field in the list: (1) equal to; (2) equal to or before (for numbers, this means equal to or less than); (3) equal to or after (for numbers, this means equal to or greater than); (4) equal to or between; (5) not equal to; (6) not equal to and before; (7) not equal to and after; and (8) not equal to and between.

Appropriate use of the selection criterion and the sort order can give the user powerful use of the computer to simplify everyday tasks. The business manager of a magazine can create a list of subscribers, including as a field in each subscriber's record the expiration date. List Handler's **PRINT FORM LETTERS** mode could be used to automatically print out customized reminder memos to each subscriber, encouraging subscription renewal. The **PRINT LABELS** mode could be used to print out mailing labels selected by the same criterion, and sorted in Zip Code order; or the **PRINT LIST** mode could be used to print out addresses on envelopes, selected by the same criterion and in Zip Code order. (The List Tutorial could well be such a list.)

Taking advantage of the tabbing features available in designing a printout, the **PRINT LIST** mode can be used to generate a simple columnar report. Suppose our magazine business manager decided to mount a phone campaign to encourage his subscribers to renew their subscriptions. The **PRINT LIST** mode could be used to print a report for use by his telephone workers. This report would contain as columns the following information: the names of subscribers, the expiration date for each (selected as those expiration dates falling within the next quarter, for example), and phone numbers sorted by area code. All this can be done in minutes!

1.3 Connections to the Word Handler and to other programs

The full powers of List Handler for generating customized form letters appear when a form letter 'template' is first created using Word Handler™ (a superior word processing program also available from Silicon Valley Systems). Word Handler's **FORM FILL-IN** mode can be used to create the master form letter, using fields contained in the List Handler list as the "blanks" to be filled in by list information.

Option 8 in List Handler Utility allows translation of information between Word Handler files and standard text files. This gives Word Handler the ability to "communicate" with other word processing programs and data management programs that produce text files. Word Handler can even be used to edit BASIC programs that have first been converted into text files. After editing, the text file can be run as a BASIC program by using the Applesoft EXEC command.

Option 7 in List Utility can translate information between a list and another program that used the DIF™ (Data Interchange Format), such as VisiCalc™. (The user is cautioned that DIF has not been entirely standardized, and that some program 'patching' may be necessary to make information transfers to some programs. This is, however, the *only* instance in which some knowledge of BASIC programming may be required of the List Handler user.)

1.4 Care of disks, back-ups, and multiple disk drives

List Handler and your Apple will work well and faithfully for you, if you treat them well. *Always treat your disks carefully*, protecting them against excessive heat, dust, magnetic fields, and bending or excessive weight. First-time users of the Apple are encouraged to read the Apple manual on the care and treatment of disks.

Because any useful list will represent a good deal of work in the entry of your data, it is always wise to make back-up copies of your important lists, and keep them in a safe place. Accidents will happen! You might at any moment drop your list disk on the floor and step on it — ruining it forever. A back-up using the List Utility is cheap insurance.

For those users having multiple disk drives (up to eight), an appendix is provided to show how List Handler treats the sequence of drives for mounting list disks.

2.0 CREATING A NEW LIST

The List Handler program *must have an existing list on which it can operate*. Although your program package contains such an existing list, List Tutorial, let's begin by creating a new — and somewhat more complicated — address file than is contained on List Tutorial. This will prepare you for the real work to be done with List Handler, creating and managing your own information lists. We will also use your newly created list to demonstrate the versatility of List Handler in creating customized form letters in conjunction with the Word Handler word processing program.

2.1 Step one: booting the List Utility program disk

The List Utility is on the reverse side of the List Handler program disk. Insert the List Utility (label side up, and holding the label “top edge”) into the “primary” disk drive (Drive 1 in Slot 6). If your computer has the “Autostart ROM”, this can be done before turning on the computer; otherwise, follow the instructions in the Apple manual for your system.

When your system boots the disk, the red light on Drive 1 will come on, and in a few seconds you will see the menu of options for List Utility. The screen display will look like this:

UTILITY MENU

1. BACK-UP LIST
 2. CREATE NEW LIST
 3. EXTEND OLD LIST ONTO NEW DISK
 4. CHANGE FIELD NAMES IN LIST
 5. ADD NEW FIELD TO LIST
 6. DELETE OLD FIELD FROM LIST
 7. CONVERT FILES: LIST <-> DIF
 8. CONVERT FILES: WORD HANDLER <-> TEXT
-

// 1-8: Option numbers

2.2 Step two: select the CREATE NEW LIST option

Select Option 2, CREATE NEW LIST by pressing the '2' key (you don't have to press RETURN here, although some other command operations of List Utility and List Handler will prompt for the RETURN key as needed).

The screen display will immediately switch to the CREATE NEW LIST mode, and will look like this:

CREATE NEW LIST

Field 1: < >

CTRL-E: Exit to utility menu
CTRL-X: Clear field name
RETURN: Next field name on page
CTRL-A: Add new field name
CTRL-I: Insert new field name
CTRL-W: Write field names to disk

2.3 Step three: the command options; enter the field names of the new list

The **cursor** (the blinking rectangular symbol) will be in the correct position to enter the name of Field 1. In making your entries (if you don't have the "shift key modification"), press and release the ESC key, and then any letter you wish to capitalize — in this case, the very first letter in Field 1. If you make an error in typing, use the LEFT ARROW key to back up and "rub out" the undesired character.

When you have finished typing a **field name**, press CTRL-A to move the cursor down to the next field to be entered. When the last desired field name has been entered, press RETURN (if you forget to hit RETURN when the last desired entry has been made, but instead hit CTRL-A, the program will prompt you to delete the un-named field you have inadvertently created when you hit CTRL-W to write the new list to disk.

Now make these entries of field names:

Field 1: <Hon>
Field 2: <First>
Field 3: <Middle>
Field 4: <Last Name>
Field 5: <Title>
Field 6: <Company>
Field 7: <Address>
Field 8: <City>
Field 9: <State>
Field 10: <Zip Code>

After you have made these 10 entries, the screen will jump to a second page for addition of more fields (the program will allow lists with up to 255 fields). A new command, CTRL-N, appears in the option menu at the bottom of the screen page, to allow "flipping" the screen pages to review entries.

Now finish the field designations for your list:

Field 11: <Phone>
Field 12: <Periodical>
Field 13: <Initial Subscription Date>
Field 14: <Modification Date>

Field 15: <Expiration Date>

Field 16: <Renewal Billing>

Field 17: <Credit?>

Field 18: <Comment>

Field 19: <Donation>

When you have finished entering your **field names**, inspect them by “paging” back and forth. Any field name may be **edited** by using the RETURN key to step down to the field to be changed (if you are on the correct page) and “writing over” the original entry. If you forgot to enter one of the field names, it can be **inserted** by using the CTRL-I command from a cursor position adjacent to the position in which the insertion is to be made. Entries may be **cleared** from the line on which the cursor is resting (for editing) by pressing CTRL-X. An entire field may be deleted by moving the cursor to that field and pressing CTRL-D.

2.4 Step four: write your new list onto a disk

When you are satisfied with your entries, press CTRL-W. The screen display will then look like this:

CREATE NEW LIST

Disk drive to be used for new list disk: //

1-8:	Drive numbers
CTRL-E:	Exit to edit field names

CAUTION: If you are going to use Drive 1, take out your List Handler Utility disk at this point, to avoid writing over and ruining this program disk! The program will give you an on-screen warning that any disk in the selected drive will have its previous information erased. If you have 2 drives, and specify that the drive to be used for the new list disk is Drive 2, you may safely leave the program disk in Drive 1.

Press '2' if you have 2 drives, or '1' if you have 1 drive.

If you wish to change your mind about the selected drive at this point, you may press CTRL-E to select another drive.

Insert a blank disk (or one that has no longer needed information on it) into the specified drive, and press RETURN.

You have now created a new list disk! Press any key to return to the utility menu.

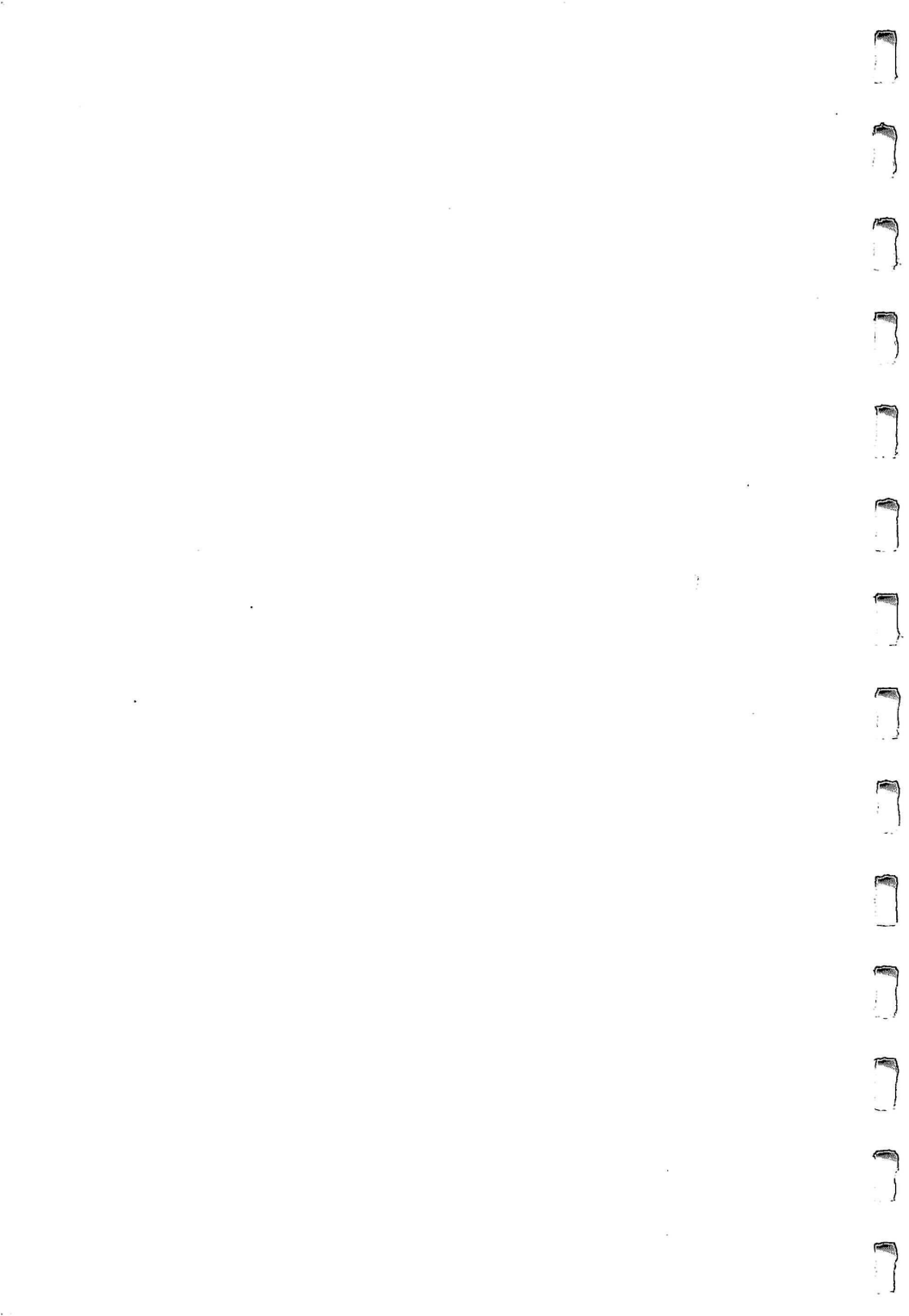
2.5 Step five: label your new list disk

Remove the new list disk from its drive. **CAUTION:** The best procedure is to place a previously written, stick-on label on the disk, giving the name of your list and its date of creation. Make it a practice **never** to write on the disk itself, especially with a pencil or ball-point pen (this could damage the disk). Use "stick-on" labels or Scotch Post-It Note Tape™, and write on the label **before** you stick the label on the disk.

Give this list the name "Subscription Mailing List," and add the date of creation.

2.6 Step six: exit List Utility by turning off the computer

You have now finished using the CREATE LIST option, and have no further need of the List Utility at this time. Turn off the computer to exit the program.



CHAPTER 2: ADDING RECORDS, SCREEN SEARCHES, AND EDITING RECORDS

In this chapter, you will learn to “input” information into the list created in the Section 2.0 exercise of Chapter One. By the time you have finished the exercises in Chapter Two, you will be expert in **adding records**, performing **screen searches** of a list, and **editing** records in a list.

3.0 ADDING RECORDS TO A LIST

This section demonstrates the steps for adding records to a list. The exercise will use the “Subscription Mailing List” disk created following the procedures in Section 2.0.

3.1 Step one: booting the List Handler program disk

Insert the List Handler program disk (label side up, holding the label “top edge”) into the “primary” disk drive (Drive 1 in Slot 6). If your computer has the “Autostart ROM” this can be done before turning on the computer; otherwise, follow the instructions in the Apple manual for your system.

When your system boots the program disk, the red light on Drive 1 will come on briefly. In a few seconds, you will see the MOUNT LIST DISK(S) menu:

MOUNT LIST DISK(S)

List disk drive(s): //

1-8: Drive number(s)

3.2 Step two: mounting the "Subscription Mailing List" list disk

The program is now asking which drive or drives are to contain disks with list information. It will recognize up to 8 disk drives "logged on" to the system at this step.

Since there is only one disk in the "Subscription Mailing List" list, you will choose only one drive on which to mount this list disk (no matter how many drives your system has).

If your system has only one disk drive, the appropriate response to the program is to press the '1' key, and then follow the on-screen prompts. (You may remove the List Handler Program disk from Drive 1 at this time, and store it in a safe place, such as your program package.)

If you have 2 or more disk drives, you have the option of leaving the program disk in Drive 1, and responding with another drive number (see the Appendix for identification of assigned numbers for multiple-drive systems). If you choose to leave the List Handler program disk in Drive 1 (which is often convenient for use of List Handler's printing routines), an appropriate response would be to press '2' to designate the list disk drive.

When you have designated the list disk drive, the screen display changes to provide additional options:

MOUNT LIST DISK(S)

List disk drive(s): 2 //

1-8:	Drive number(s)
RETURN:	No more list drives
CTRL-E:	Re-enter disk drive number(s)

At this point, the program is asking whether you want to designate (one by one) any additional drives on which to mount list disks. You are also given the option (by pressing CTRL-E) of changing the previously designated list disk drive(s).

If you have entered '1' for a one-drive system, or '1' or '2' for a multiple-drive system, press RETURN.

Insert the "Subscription Mailing List" list disk in the list disk drive you have selected, and then press RETURN. Your list is now mounted (logged on).

3.3 Step three: List Handler's ADD RECORDS mode

With your list mounted, the screen will display the MAIN MENU:

MAIN MENU

1. ADD RECORDS
 2. FIND RECORDS
 3. PRINT FORM LETTERS
 4. PRINT LABELS
 5. PRINT LIST
 6. MOUNT LIST DISK(S)
-

// 1-6: Option numbers

Press '1' to select List Handler's ADD RECORDS mode. The screen display will change:

ADD RECORDS

<Hon.>: //

<First>:

<Middle>:

<Last Name>:

<Title>:

RETURN:	Next field	CTRL-N: Next page
CTRL-X:	Clear line	
CTRL-A:	Add record to list	
CTRL-E:	Exit to main menu	

You will recognize the **field names** as those used to create "Subscription Mailing List." But only a few of the fields are visible on the screen.

The options menu at the bottom of the screen lists commands that are available in the ADD RECORDS mode.

Press CTRL-N to call up the next page of your list. Press CTRL-N once more to see the third screen page — and once again to review the fourth and final screen page. One more time, to return to the first page of the record.

Pressing the RETURN key will move the cursor down to the next field. Press RETURN until the cursor is at the bottom field on the page. Pressing it once more will return it to the top field position on the page.

The CTRL-X command is used to clear any information previously entered in a field. This command is especially useful to clear information from a field that should be blank. Demonstrate the use of CTRL-X by paging to the fourth page of your list record (using CTRL-N). Press RETURN twice to move down to the <Comment> field. Type (using the ESC key for capitalization) "Mr. Throttle-bottom is an idiot."

Oops! That kind of comment probably shouldn't be in one of your business records. Let's delete it. Press CTRL-X and it will be gone forever. (Note that using the SPACE bar to overstrike the first character in an existing field also deletes the contents of the field; but this leaves a space character in the field, and so uses a little disk storage space for no good reason.) Remember to press CTRL-N to return to the first screen page of the record.

The CTRL-A command is only used when all the desired information has been entered into all the pages of a record that are to be filled out. This command confirms that the record is to be entered into the list. (CTRL-A will even enter a blank record if pressed now.)

CTRL-E should **always** be pressed to exit from the ADD RECORDS mode. When this command is pressed, any records that have been entered but not yet stored will be written onto the disk. Recently entered records could be lost, if the computer is turned off without first pressing CTRL-E!

After a session of adding records, you may exit from List Handler by first pressing CTRL-E to save your entries; when the MAIN MENU appears on the screen, the computer may be turned off.

3.4 Step four: add records to "Subscription Mailing List"

Before we start adding records, there are several conventions you will always want to observe. Because List Handler provides no formatting of entries or error trapping, repetitive entries (such as the names of the periodicals in our sample list) should *always* be entered in exactly the same way. A simple "marker" kind of entry that will be easy to enter and to search is the type we will use for the <Credit?> field: "y". Note that this should also be consistent. *Never* answer "y" in some records, and "yes" in others.

Dates should always be entered in the form MM/DD/YY or M/D/YY. This is because List Handler has, in the printing modes, very powerful capabilities for selecting and sorting on dates, ranges of dates, etc.

If you have any need to do screen searches of your list for phone numbers by area code, a standard format such as (XXX) should be used. The screen search mode can then look for this pattern (including the parentheses) for an area code search, such as "(312)".

When you begin to design your own lists, try to condense repetitive and standard field items. For example, in our sample data base, we have two periodicals, "The Birdwatcher" and "Contractors' News." Both to simplify entries to prevent typographical errors, and to save time, the best practice would be to abbreviate these names, for example, "B" for "The Birdwatcher" and "CN" for "Contractors' News."

It will take you a little time to fill in the suggested record entries (a total of 11 records). If you wish, you may enter only a few of them. But this would be a good time to get practice, experience and confidence in using List Handler!

Now enter these "made-up" records into your list, starting with the first record below:

<Hon.>: Mr.
<First>: William
<Middle>: P.
<Last Name>: Howard
<Title>: President

(Press CTRL-N to move to the next page.)

<Company>: Acme Brick Co.
<Address>: 1241 Airline Hwy.
<City>: Baton Rouge
<State>: LA
<Zip Code>: 70815
<Phone>: (504) 392-8170
<Periodical>: Contractors' News
<Initial Subscription Date>: 10/15/79
<Modification Date>: 10/15/81
<Expiration Date>: 10/15/82
<Renewal Billing>: 24.78
<Credit?>: y
<Comment>: Free subscription because of editorial assistance and help in gathering regional news.
<Donation>:

Press CTRL-A to add the record, and then any key to add another record.

Here's a listing of the rest of the records to be entered. Go ahead and enter them now; they will be used in further exercises on screen searches, form letters, mailing labels, and list reports.

Record:

<Hon>: Miss
<First>: Elizabeth
<Middle>: C.
<Last Name>: Hayes
<Title>: Recording Secretary
<Company>: Birdwatchers, Inc.
<Address>: 6840 Inglewood Dr.
<City>: Memphis
<State>: TN
<Zip Code>: 38108
<Phone>: (901) 525-1223
<Periodical>: The Birdwatcher
<Initial Subscription Date>: 11/1/78
<Modification Date>: 11/1/81
<Expiration Date>: 11/1/82
<Renewal Billing>: 19.45
<Credit?>:
<Comment>:
<Donation>:
End of record.

Record:

<Hon>: Ms.
<First>: Sylvia
<Middle>: Martin
<Last Name>: Jones
<Title>: Chairperson
<Company>: The Avian Society
<Address>: 3364 Peacock St.
<City>: San Francisco
<State>: CA
<Zip Code>: 94101
<Phone>: (415) 425-8382

<Periodical>: The Birdwatcher
<Initial Subscription Date>: 9/27/67
<Modification Date>: 9/27/81
<Expiration Date>: 9/27/82
<Renewal Billing>: 19.45
<Credit?>: y
<Comment>: The Avian Society's donation for support of Bird-
watcher was so long ago that we should start charging for subscrip-
tions in 1983.
<Donation>: \$150.00 in 1967.
End of record.

Record:

<Hon>: Mrs.
<First>: Brenda
<Middle>: M.
<Last Name>: Knight
<Title>: Senior Analyst
<Company>: Boggs, Boggs and Boggs, Inc.
<Address>: 2486 Elm Rd.
<City>: New York
<State>: NY
<Zip Code>: 10451
<Phone>: (212) 799-5951
<Periodical>: Contractors' News
<Initial Subscription Date>: 9/29/80
<Modification Date>: 9/29/81
<Expiration Date>: 9/29/82
<Renewal Billing>: 24.78
<Credit?>: y
<Comment>: She has provided several outstanding articles.
<Donation>:
End of record.

Record:

<Hon>: Colonel
<First>: George
<Middle>: M.

<Last Name>: Lee
<Title>: Project Engineer
<Company>: U. S. Air Force
<Address>: 4148 Alamo Rd.
<City>: Baltimore
<State>: MD
<Zip Code>: 21233
<Phone>: (301) 851-1759
<Periodical>: Contractor's News
<Initial Subscription Date>: 10/25/76
<Modification Date>: 10/25/81
<Expiration Date>: 10/25/82
<Renewal Billing>: 24.78
<Credit?>:
<Comment>:
<Donation>:
End of record.

Record:

<Hon>: Mr.
<First>: John
<Middle>: G.
<Last Name>: Lee
<Title>: Vice President
<Company>: Billings and Associates
<Address>: 2559 Alamo Dr.
<City>: Jacksonville
<State>: FL
<Zip Code>: 32201
<Phone>: (904) 541-1134
<Periodical>: Contractors' News
<Initial Subscription Date>: 10/14/79
<Modification Date>: 10/14/81
<Expiration Date>: 10/14/82
<Renewal Billing>: 24.78
<Credit?>:
<Comment>:
<Donation>:
End of record.

Record:

<Hon>: Mrs.
<First>: Ursala
<Middle>: S.
<Last Name>: Martin
<Title>: President
<Company>: Kansas Jayhawks
<Address>: 9672 Virginia Lane
<City>: Kansas City
<State>: MO
<Zip Code>: 64108
<Phone>: (816) 306-4479
<Periodical>: The Birdwatcher
<Initial Subscription Date>: 10/15/81
<Modification Date>:
<Expiration Date>: 10/15/82
<Renewal Billing>: 19.45
<Credit?>: y
<Comment>: The Jayhawks look like a good prospect for more donations — let's keep on them.
<Donation>: \$600.00 in 1981.
End of record.

Record:

<Hon>: Ms.
<First>: Irene
<Middle>: B.
<Last Name>: Owens
<Title>: President
<Company>: Owens Construction Co.
<Address>: 7044 Bancroft Dr.
<City>: Los Angeles
<State>: CA
<Zip Code>: 90052
<Phone>: (213) 549-6538
<Periodical>: Contractors' News
<Initial Subscription Date>: 9/25/72
<Modification Date>: 9/25/81

<Expiration Date>: 9/25/82

<Renewal Billing>: 24.78

<Credit?>:

<Comment>:

<Donation>:

End of record.

Record:

<Hon>: Mr.

<First>: William

<Middle>: C.

<Last Name>: Parker

<Title>: Chairperson

<Company>: Hoosier Birdwatcher's Club

<Address>: 2374 Virginia Ct.

<City>: Indianapolis

<State>: IN

<Zip Code>: 46206

<Phone>: (317) 628-7856

<Periodical>: The Birdwatcher

<Initial Subscription Date>: 10/2/81

<Modification Date>:

<Expiration Date>: 10/2/82

<Renewal Billing>: 19.45

<Credit?>:

<Comment>:

<Donation>:

End of record.

Record:

<Hon>: Mr.

<First>: Peter

<Middle>: E.

<Last Name>: Smith

<Title>: Editor

<Company>: Ornithology News

<Address>: 1385 Elm Dr.

<City>: Philadelphia

<State>: PA

<Zip Code>: 19104
<Phone>: (215) 459-2944
<Periodical>: The Birdwatcher
<Initial Subscription Date>: 10/12/81
<Modification Date>:
<Expiration Date>: 10/12/82
<Renewal Billing>: 19.45
<Credit?>:
<Comment>: Since he won't give us a free subscription to
Ornithology News, no freebies for him.
<Donation>:
End of record.

Record:

<Hon>: Representative
<First>: H.
<Middle>: P.
<Last Name>: Thistle
<Title>: Congressman, 1st District ME
<Company>: U. S. Congress
<Address>: 102 Cannon House Office Building
<City>: Washington
<State>: DC
<Zip Code>: 20020
<Phone>: (202) 225-1212
<Periodical>: The Birdwatcher
<Initial Subscription Date>: 9/28/80
<Modification Date>: 9/28/81
<Expiration Date>: 9/28/82
<Renewal Billing>: 19.45
<Credit?>: y
<Comment>: A steadfast protector of birds.
<Donation>:
End of record.

Good. You now have a list that contains records. Hit CTRL-E to make certain that they have all been written to your list disk, and return to the MAIN MENU. If you wish, you may now turn off the computer and take a break before proceeding to the next exercise.

4.0 HOW TO DO SCREEN SEARCHES ON YOUR LIST

Your list disk should be mounted and the screen display should show List Handler's MAIN MENU to begin this exercise. If necessary, review Sections 3.1 and 3.2 to get to the MAIN MENU.

4.1 Step one: use of the cursor to select search condition modes

Press '2' to select the FIND RECORDS option. The screen will then provide this display:

FIND RECORDS

Set Search Condition

// Search all fields for
the word(s):

->:	Display next field choice
<-:	Display last field choice
RETURN:	Enter field choice
CTRL-E:	Exit to main menu

The options menu at the bottom of the screen show four available commands. The first two, the RIGHT ARROW and LEFT ARROW keys, have different functions according to their position on the menu screen.

When the cursor is to the left of the screen line that reads "Search all fields for" (the initial position of the cursor), the RIGHT ARROW key is used to set the search condition for "all fields" (the initial state), *or for a search on any specific field contained in the record.*

Press the RIGHT ARROW key once. The first field name in "Subscription Mailing List" appears. Press the LEFT ARROW key. The "Search all fields for" phrase has returned. Press the LEFT ARROW key once more. The *last* field name, "<Donation>", appears. Using the ARROW keys this way, you can quickly select any

specific field to be searched, or search all fields at once for your search term.

Using the ARROW keys, return to the "Search all fields for" display. Now press RETURN once. The cursor will drop down a line, and will be to the left of the phrase, "the word(s):". Press the RIGHT ARROW key. This phrase has changed to "the character(s):". The ARROW keys are used to "toggle" between these modes.

Each mode, word or character, has its uses in searches. A word search looks through all field or a specified field, for a match between the field contents and the search word or phrase. In this mode, if the search term is "Smith", the search will look for records that match this word. A **character search** looks for a match based on a specified character or string of characters. In this mode, if the search term is "Smi", the search will look for records that match, and will call up for inspection records that contain such character strings as "Smith", "smile", "Smithfield", and "osmium". Depending on your needs, either mode may be useful for retrieving information.

Press one of the ARROW keys to return to the initial phrase, "the word(s):".

4.2 Step two: the "no select criterion" search

It is handy to know that the organization and content of your list disk can be quickly reviewed by using the **no select criterion search**. This is done by pressing the RETURN key to place the cursor on the line *below* the phrase "the word(s):", and then pressing RETURN once again. The "In Use" light will come on briefly on your list disk drive, and the first screen page of the *first record entered into the list* will appear. Do it. You should see this screen display:

<Hon>: Mr.
<First>: William
<Middle>: P.
<Last Name>: Howard
<Title>: President

//	RETURN:	Next record	CTRL-N:	Next page
	CTRL-C:	Change record		
	CTRL-D:	Delete record		
	CTRL-E:	Exit to main menu		

4.3 Step three: the command options for the FIND RECORDS/View Record mode

You are already familiar with the operation of three of the five commands available. The RETURN key, when pressed, will move to the next record that meets the search criterion. Press RETURN now. You will see the first page of the *second* record entered into your list (Miss Elizabeth C. Hayes, if you followed the suggested order of entry). Press CTRL-N to move to the second page of this record, where you will find that Miss Hayes' address is in Memphis, Tennessee.

Don't press CTRL-E now. When you do press it, at the end of this session, you will return to the MAIN MENU for exit from List Handler. (But it is very easy to get back to FIND RECORDS from the MAIN MENU.)

CTRL-C (change record) is the **record edit** command. It operates on any record that has been selected and brought to the screen for review. When CTRL-C is pressed, the RETURN key is used to move to the field that is to have its contents changed, and the contents can be simply written over, or erased with the CTRL-X command. In this mode, RETURN and CTRL-N operate just as they do in the ADD RECORDS mode. After a record change has been made, it is confirmed by pressing CTRL-A, and then following the screen prompt.

Any record being displayed on the screen can be **deleted** by pressing CTRL-D, and then confirming the command by responding "Y" when the program asks if you really mean it. **Once deleted, a record is gone forever!**

Notice that you can examine all the records in your list by continuing to use the RETURN and CTRL-N commands.

Now, let's move on to a more interesting search. Press CTRL-E to return to the MAIN MENU.

4.4 Step four: Who is getting free subscriptions, and why?

Search and edit

From the MAIN MENU, select Option 2, FIND RECORDS. When the FIND RECORDS menu appears, press the LEFT ARROW key three times to move to the <Credit?> field for a search of your list.

Press RETURN twice, to move the cursor below the line that reads "the word(s):". (This particular search could be made using either the **search word(s)** or the **search character(s)** option, so use the **search word(s)** option this time.) Now type "y". *List Handler doesn't distinguish between upper and lower case for entry of a search condition character or word.*

You have set up a **screen search** based on the **search condition** that the word "y" must appear in the field named <Credit?>. Now press RETURN to carry out that search.

The "In Use" light will come on briefly on the list disk drive, while List Handler examines all the records for matches against your search condition.

The first record to appear on your screen will be that of Mr. Howard. Turning to page 3, you will see that he has a subscription to the periodical, Contractors' News. Turning to page 4 of his record, you will see that he is being given credit for the subscription because of the assistance he has provided.

In your hypothetical role as business manager of a small publishing house, you still have time to decide whether or not to give Mr. Howard a free renewal of his subscription. If you decide to charge him, all you have to do is press CTRL-C to edit his record, move the cursor to the <Credit?> field, and press CTRL-X to delete the "y"

in that field. If you do this, then when you later use List Handler to generate form letters invoicing subscribers for subscription renewal, Mr. Howard will receive an invoice for \$24.78 for renewal. What decision would you make?

Whatever your decision, press RETURN and you will be given the opportunity to decide whether or not to continue that free subscription to The Birdwatcher to Ms. Jones (that one does look questionable). If I were you, though, I would definitely give a free subscription to Mrs. Martin.

You have just received a check for \$1,200.00 from the Hoosier Birdwatcher's Club, to help support publication of The Birdwatcher. Call up and edit the record of the club officer who has a subscription ("Search all fields for the word(s): Hoosier" will be effective). Edit the <Donation?> field to insert "\$1200.00 in 1982." Give the club's officer a free subscription renewal by inserting "y" into the <Credit?> field.

You have just received a subscription cancellation from a person who lives at 6840 Inglewood Dr. Call up that record and delete it from your list.

4.5 Step five: terminate session

As always, return to the MAIN MENU before turning off the computer to exit List Handler.

CHAPTER THREE: PRINTING FORM LETTERS BASED UPON A LIST

5.0 INTRODUCTION TO THE PRINTING FEATURES

List Handler provides three powerful printing routines, **PRINT FORM LETTERS**, **PRINT LABELS**, and **PRINT LIST**.

5.1 Features shared by the printing routines

All three printing routines share the ability to set *a search criterion based on relationships between the contents of the selected field (or all fields), and the user-specified search term*. There are eight basic logical relationships that can be used, so that very interesting “questions” can be asked about the information within a list.

Unlike many other data management computer programs, List Handler specifies these logical relationships on-screen in ordinary English language, so that the user does not need to learn or remember cryptic logic symbols. The **ARROW** keys are simply used to “walk” back and forth through these relationships that can operate on the selected field; the desired one is then chosen by pressing **RETURN**.

The printing routines also allow the user to **sort** the printed information into an **order** that can be established on the contents of any field, and can be alphabetical, numerical, or chronological.

The information fields to be “pulled” from the list in printed form can then be identified either by a simple command at the keyboard, or by instructing the program to “read” a previously stored document from disk.

Finally, each of the three printing routines has a standard printing format that can be modified by the user, and can cover the range of printed "output" from mailing labels to lists, simple columnar reports, and complex, customized form letters. Although, for example, the PRINT FORM LETTERS routine can be modified to print mailing labels (and is a good choice for this use for our complex SUBSCRIPTION MAILING LIST), there are some differences between the printing formats that will become more clear in the course of exercises using them.

All these features of the printing routines are managed by cursor movements using the ARROW keys, or by simple commands defined in the option menu at each stage.

The printing routines cannot be used without a printer! When using a printing routine, you will be prompted to prepare the printer, and then press any key to start printing. Make certain that the printer is turned on and has paper at this point, before pressing a key.

5.2 How to designate the printer slot in your computer

List Handler can accommodate a wide range of printers. Only one item of information is required to set the program up for work with your printer. This needs to be done only the first time the program is booted; the information will be stored on the program disk.

The first time the program is booted, it will request the SLOT NUMBER of the printer card (either a serial or a parallel card) that must be connected to the printer. Simply type the slot number (in most cases, the printer card is installed in Slot 1). The Apple manual or your computer store can provide assistance if the printer card slot number is unknown.

If the printer card should be moved to a different slot, List Handler can be told the new slot number by pressing the SPACE BAR when the program begins booting. Type in the new slot number when prompted. (You can at any time "query" the program as to which printer slot it expects to use, by pressing the SPACE BAR as the program begins to boot.)

5.3 How to select for “form feed” or “sheet feed” printing

List Handler's standard printing format in each printing routing is set for *continuous printing on printers that can handle continuous form paper* (such as fan-fold paper). If you do not wish to use this feature, answer “Yes” to the question “Stop between pages?” This will be the last option line on the “Setting the printout conditions” screen menu. Stopping between pages will allow manual insertion of paper; follow the screen prompt to resume printing.

6.0 USING THE PRINT FORM LETTERS ROUTINE WITH “SUBSCRIPTION MAILING LIST”

This exercise will demonstrate the capabilities of List Handler to generate customized form letters, invoices, and many other useful applications based on selective use of information in a list.

Because of the variety of printers and their type sizes, the documents that will be printed out in exercises may or may not be attractively set up as business letters. The margins may be too wide or too narrow, depending on the type pitch in the user's printer.

It is a simple matter to experiment with the options in the “Setting printout conditions” menu (especially characters per line, characters left margin, characters right margin, and lines in top margin) to “redesign” the sample form letters for attractive appearance as business correspondence. The user is encouraged to take notes on the various formats tried out, so that the combination that works best can be used in the future.

6.1 Step one: choose PRINT FORM LETTERS from the MAIN MENU

The List Handler main program disk should have been booted and the “Subscription Mailing List” list disk mounted (if necessary, refer to Section 3.0 for a refresher on these items).

From the MAIN MENU, select PRINT FORM LETTERS by pressing ‘3’. The screen will display this menu:

// Select all records

->:	Display next field choice	
<-:	Display last field choice	
RETURN:	Enter field choice	
CTRL-E:	Exit to main menu	CTRL-N: Next page

6.2 Step two: Discussion — choice of 'all records' or a selected field, using the command options

The command options available on the display screen look, at first, very much like those used for a **screen search**. However, the available options and commands for a printing routine are much more extensive than those for a screen search. The first clue to this is the presence of the CTRL-N command on the last line of the option menu. After a choice has been made among all the available options provided by the on-screen menu, pressing CTRL-N will successively bring up several more menu screens that are necessary to specify all the conditions for a printing routine.

This first menu deals with setting **record selection conditions**. With the cursor to the left of the phrase "Select all records," the first choice available is whether to press RETURN (which will select all records), or use the RIGHT ARROW key to "walk" through the fields in the list until the desired field name is displayed (the LEFT ARROW key operates in the reverse direction). When the desired field name is displayed, press RETURN.

If the desired choice is "Select all records," pressing RETURN will end this phase of the process, and the next step would be to press CTRL-N to move on to the next menu, which allows sort order specifications for the printing routing.

If, however, the search must be made on the contents of a specified field in the record, a further step must be undertaken.

6.3 Step three: Discussion — selection of the logical conditions set for the selected field in the search of records, using the command options

The screen display has changed to a two-line format for select conditions, as a result of the choice made in Section 6.2. The first line displays the choice made for the field in the search.

The cursor is now to the left of a line that reads “alphabetically equal to:”. The ARROW keys are used to “walk” through other logical possibilities — there are a total of eight (see Section 1.2). The exercises in this manual will illustrate several of the types of logical operations available.

Some hints and cautionary notes in setting up the logical conditions for a search:

- 1) “Equal to” (whether alphabetically, numerically, or chronologically) means that the entire contents of a field of a record must be **identical to** the alphabetical, numerical, or date entry which is to be specified for the search. You now have two sample lists on which searches may be conducted (Tutorial List, and Subscription Mailing List). The fields containing persons’ **names** act very differently in searches using printing routines, for these two lists. If, for example, you wish to send an invoice to all persons named “Smith”, the differing field structures of these two lists would require different search strategies.

Using “Subscription Mailing List,” a search on the <Last Name> field for all records “alphabetically equal to” ‘Smith’ in this field would work beautifully.

This search strategy *would not work* using the “Tutorial List,” for a selection of records based on the contents of <Last Name, First Name> — simply because the contents of this field, even for a person named Smith, are *not equal to* ‘Smith’. These fields also contain other characters *in addition to* ‘Smith’! After ‘Smith’ the contents of this field include ‘,’, ‘ ’, and a First Name, e.g., ‘Veronica’.

Several alternative search strategies might work well to identify all the records containing the Last Name ‘Smith’ in “Tutorial List.” For example, the cursor could be used to select

logical possibility "equal to or after:" 'Smith'. Or, the search could be set up to pull records using "alphabetically equal to or between:" 'Smitg' and 'Smiti'. (Of course, these strategies might also pull up some records *in addition to* the ones sought, such as those for 'Smithfield'. (You may simply press CTRL-Z to stop printing, when the search starts to pull additional records that are not desired.)

You should take such considerations in mind during the **design of a new list**. If you need to "isolate" records based on "Last Name," it would be wise to "break up" names as is done in "Subscription Mailing List."

- 2) **Numbers** can in many cases — and sometimes should be — searched for using "alphabetical" rather than "numerical" search strategies. For example, Zip Codes, or ranges of Zip Codes, can be successfully searched by treating them as alphabetical, rather than numerical entries. There is a good illustration as to why most Zip Code searches should be done using the alphabetical search strategy. When nine-digit Zip Codes become required, appropriate searches (and sorts) can be designed to handle such mixed sequences (some entries will be five-digit and some will be nine-digit) with the alphabetical mode, but would be difficult or impossible using numerical search or sorting conditions.
- 3) "Alphabetical" rather than "numerical" searches and sorts can also be put to good use for other entries such as phone numbers, where it may be desirable to search or sort based on area code.
- 4) Stick to standardized conventions for making entries, particularly so as to maximize the chances at a later date of using a new search strategy. **Dates** should be entered using a standard convention such as MM/DD/YY, or M/D/Y (although MM-DD-YY will also work). List Handler will recognize several variant ways of entering dates — but *standardize* to make certain! Likewise, standardize the way you enter phone numbers, e.g., (202) 555-1212, so that you can take advantage of the search strategies based on your knowledge that all your phone numbers in a list have the same format.

6.4 Step four: selecting the field to search

Return the screen display to that shown in Section 6.1 (if necessary, press CTRL-E, and then select Option 2 from the MAIN MENU).

You will print out form letters to those persons on your "Subscription Mailing List" that offer *free renewals to those persons whose records contain the entry 'y' in the <Credit?> field.*

It is now necessary to select the field (in this case, <Credit?>) on which the search will operate. Press an ARROW key (hint — since the desired field is near the end of the record, press the LEFT ARROW key to save keystrokes) until the display reads "Select records with <Credit?>."

6.5 Step five: selecting the logical condition

A second line has appeared on the screen beneath the defined search field. Move the cursor to the second line, if necessary, by pressing RETURN.

The ARROW keys may now be used to "walk" through the eight available logical conditions of the search. In this case, the selection will be made on the initial possibility, "alphabetically equal to:". Confirm this by pressing RETURN.

The cursor will now move down another line on the screen display, to allow entry of the field contents on which a match is to be made.

Since you will select those records whose content is 'y' in the <Credit?> field, enter 'y' now, and press RETURN.

You are now ready to move to the next screen menu for preparing to print form letters. Press CTRL-N.

6.6 Step six: setting print order (sort)

The screen should now display this menu:

PRINT FORM LETTERS

Set Printing Order

// Do not order form letters

->:	Display next field choice	
<-:	Display last field choice	
RETURN:	Enter field choice	
CTRL-E:	Exit to main menu	CTRL-N: Next page

What is the **printing order, or sort**? Simply, the printout can be ordered according to the content of any selected field, using ascending or descending order based upon alphabetical, numerical, or chronological entries in the fields.

One common use of sorting for form letters or mailing labels is Zip Code sort, to take advantage of lower postal rates for pre-sorted mailings. This is easily accomplished by selecting the <Zip Code> field, and choosing to order it alphabetically, in ascending order.

The first option provided on the screen menu is *not* to order the printout. If this option were selected (don't do this, because we will be doing a sort), this phase of preparation can be concluded by pressing RETURN, and then CTRL-N to move on to the next printing routine menu.

To do a Zip Code sort on your form letter, use the ARROW keys to "walk" through the fields in the list until the display shows <Zip Code>. Press RETURN.

The cursor will now move to a second line, which reads "in ascending alphabetical order." Since this is the order we wish to use, press RETURN.

Now press CTRL-N to move to the next menu in preparation for printing.

THE LIST HANDLER

MAAMOTH PUBLISHING COMPANY, INC.

1313 Fifth Avenue, Suite 13
New York, NY 10450
(212) 755-1212

August 8, 1982

<Hon> <First> <Middle> <Last Name>
<Title>
<Company>
<Address>
<City>, <State> <Zip Code>

Dear <Hon> <Last Name>:

It is a pleasure to inform you that your subscription to "<Periodical>," which expires <Expiration Date>, is being extended an additional year.

Normally, the renewal billing for "<Periodical>" would be \$<Renewal Billing>.

Your subscription is being renewed at no charge, because of your valued support and assistance.

I hope that in your capacity as <Title> of <Company>, you will continue to benefit from the news and articles provided by "<Periodical>."

Sincerely,

B. Warren Smyth
Subscriptions Manager

FIGURE 1

**The document 'Free Renewal', used to generate form letters
(Contained on the 'Tutorial Document' disk.)
(Word Handler file, format set for 10 pitch, printed in 12 pitch here.)**

MAMMOTH PUBLISHING COMPANY, INC.

1313 Fifth Avenue, Suite 13
New York, NY 10450
(212) 755-1212

August 8, 1982

Mrs. Brenda M. Knight
Senior Analyst
Boggs, Boggs and Boggs, Inc.
2486 Elm Rd.
New York, NY 10451

Dear Mrs. Knight:

It is a pleasure to inform you that your subscription to "Contractors' News," which expires 9/29/82, is being extended an additional year.

Normally, the renewal billing for "Contractors' News" would be \$24.78.

Your subscription is being renewed at no charge, because of your valued support and assistance.

I hope that in your capacity as Senior Analyst of Boggs, Boggs and Boggs, Inc., you will continue to benefit from the news and articles provided by "Contractors' News."

Sincerely,

B. Warren Smyth
Subscriptions Manager

FIGURE 2

Actual printout of a form letter
Using document 'Free Renewal' and "Subscription Mailing List"
(Printed in 10 pitch.)

6.7 Step seven: the "Input Document" menu

The display screen should show:

PRINT FORM LETTERS

Input Document

//

CTRL-N:	Next page	RETURN:	Start new line
CTRL-E:	Exit to main menu	CTRL-X:	Clear line
CTRL-F:	Use field variable	CTRL-L:	Load document from disk

The cursor blinks steadily in the upper left hand of an otherwise blank area of the screen. Below the second dotted line are the command options.

Most of the commands are familiar from previous discussions and exercises. However, there are now two new commands available to the user.

Introductory discussion of the CTRL-F command: CTRL-F, "Use field variable," gives the user the remarkable ability to print on the screen the field names contained in the list being used, using the ARROW keys to select the field names. These field names selected by CTRL-F may be printed on a line or lines in conjunction with other text typed onto the screen from the keyboard.

Try this exercise: press CTRL-F. The first field name contained in the list suddenly appears on the screen, <Hon (don't worry that the '>' portion of the field name hasn't yet appeared). Now, press the SPACE BAR. The '>' closes on the previous field name, and the cursor appears one space to the right. Press CTRL-F again. Again, the first field name appears; use the RIGHT ARROW key to move to the second field name. Press SPACE BAR and then CTRL-F, and use RIGHT ARROW to move to the third field name. Repeat this operation to move to the fourth field name, and this time press RETURN to move to the next screen line.

You should have on screen the first line of the following document. Use the CTRL-F, ARROW, SPACE BAR, and RETURN commands to produce the document as it appears as follows:

```
<Hon> <First> <Middle> <Last Name>  
<Title>  
<Company>  
<Address>  
<City>, <State> <Zip Code>
```

Note: the comma was entered after <City> by using the LEFT ARROW to back up a space so that ',' could be entered, and then SPACE BAR was pressed before using CTRL-F and RIGHT ARROW to call up <State>.

You have produced a document that could be used for mailing labels to accompany the form letters that will shortly be printed out! (As a matter of fact, this document is already on your "Tutorial Document" disk under the name 'Label'.)

Now clear the screen by pressing CTRL-X repeatedly until the cursor is on a blank "document area" screen.

Do another document entry exercise, using the available commands, to produce a document that looks like this:

```
<Last Name>'s subscription expires <Expiration Date>.
```

Notice that text can easily be interspersed with the list field names simply by typing in an ordinary fashion. This little document could actually be used to generate a simple and useful report from your list.

Now erase the document area once more, using the CTRL-X command.

Introductory discussion of the use of CTRL-L to load previously prepared documents from lists: Since a form letter may be a relatively complex document (with centered date, vertical spacing to accommodate your letter head, etc.) it is usually more convenient to load a previously prepared document that has been stored on disk.

Such documents can be prepared using a **word processing program**. Word Handler is recommended, but other word processing programs that produce DOS 3.3 text files may also be used.

See **Figure 1** to see the document 'Free Renewal' that will be used to generate form letters from the "Subscription Mailing List." Note that the document contains several field names written **exactly as they appear in the list** — this is an absolute requirement. There can be not

the slightest deviation from the way the field names are written, if the document is to work properly with List Handler. Notice that a single field name can be used repeatedly in a document, and that several field names may be used on the same line.

6.8 Step eight: load "Free Renewal" form letter using the CTRL-L command

With the "document area" blank, press CTRL-L. (Note that a new command, CTRL-I, has appeared in the option menu. If you wished, this command could be used to return to keyboard entry of a document.)

The screen will now prompt for the name of the document to be loaded from disk. Type 'Free Renewal' (note that the document name may be typed in lower case, without capitalization of any letters — List Handler will still recognize the document name).

The screen will now prompt insertion of the document disk into the primary drive (Drive 1, Slot 6). First remove the disk that is presently in that drive, and insert the 'Tutorial Document' disk (since that is the disk containing the 'Free Renewal' document).

When RETURN is pressed, the document will quickly be read from the 'Tutorial Document' disk.

CAUTION: remember to follow the next screen prompt! You are prompted to replace the disk previously removed, before insertion of 'Tutorial List'. Do so now, and continue to follow the screen prompts. (If you are using only one disk drive, you will need to swap disks several times; if you have two or more drives and have placed the List Handler master program disk in Drive 1 from the beginning, no more disk swapping will be required for this form letter.)

Press CTRL-N to move to the next screen menu step.

6.9 Step nine: "Set Printout Conditions"

The screen will now show this display:

PRINT FORM LETTERS

Set Printout Conditions

Lines per page: 66
Characters per line: 85
Characters in left margin: 10
Characters in right margin: 9
Lines in top margin: 5
Lines in bottom margin: 6
Stop between pages? No

RETURN:	Enter number of character lines per page
CTRL-E:	Exit to main menu
CTRL-X:	Clear a line
CTRL-N:	Next page

As a matter of fact, these parameters are set up very nicely to print out a document that has been set up using the Word Handler word processing program, and that was prepared using Word Handler's "default" print format and 10-pitch type.

Any of these parameters may be altered to suit your purposes. If, for example, you wish printout on legal size paper (instead of standard 8½ by 11 inch paper), set lines per page to 84 — figure 6 lines of print per vertical inch of the sheet. If you are using 12 pitch instead of 10 pitch type, set the characters per line to 102 (the maximum number of columns on a sheet 8½ inches wide, at 12 characters per inch).

You should take particular note of the last query, "Stop between pages?" If you are using continuous fan-fold paper in your printer, the appropriate answer is 'No'. *But if you must insert a new sheet of paper for each new letter printed, the appropriate answer is 'Yes'.* If so, move the cursor down to this line by pressing RETURN, and enter 'y' for 'Yes'.

When you are satisfied with the printout conditions (we suggest you leave this as is at this time, unless it is necessary to stop between pages), press CTRL-N to move to the next step.

Follow all the screen prompts.

When prompted to prepare your printer, make certain that the

printer is turned on, and contains paper. Press any key, and in a short time the printer will produce your form letters. See **Figure 2** for an actual printout of one of the form letters.

6.10 An infinite variety of form letters based on the list information!

In the exercise above, you acted in your hypothetical role of a magazine subscription manager, sending out free renewals to persons in compensation for their assistance.

But you must have some income to stay in business. Using a differently constructed document, 'Renewal Billing' contained on the "Tutorial Document" disk, but still employing information in the "Subscription Mailing List," a very different series of letters can be sent out. In these form letters, paying subscribers can be warned of their approaching subscription expirations, informed of the subscription renewal cost for the periodical to which they subscribe, and invited to renew.

Only two steps are different from the procedures needed to produce your 'Free Renewal' form letters.

Just as in Section 6.5, select the <Credit?> field. However, instead of selecting the logical relationship "alphabetically equal to:" as in Section 6.5, move the cursor (at this stage) to select "alphabetically not equal to:". Press RETURN, and, just as in Section 6.5, type 'y' as the content of the field for search purposes.

The search selection is now reversed. Instead of selecting those records that contain 'y' in the <Credit?> field, as in Section 6.5, the new search strategy selects all records *except* those that contain 'y' in this field.

This defines a different class of persons for the new form letters — those who are to be billed for subscription renewal.

A Zip Code sort can be used for this new form letter, just as in Section 6.6.

The second difference in this form letter will be the document called up from disk using CTRL-L (see Section 6.7). After pressing CTRL-L, type in the document name, 'Renewal Invoice' and follow the rest of the procedures in Sections 6.8 through 6.9.

6.11 Other uses of the PRINT FORM LETTERS routine

The PRINT FORM LETTERS printing routine is actually capable of printing mailing labels, lists and reports. The printing condition parameters (see Section 6.9) can easily be modified to accommodate the "small pages" of continuous strip mailing labels.

Using a ruler, measure the distance from the top of one mailing label to the top of the next on a continuous strip. A relatively standard interval is 1.5 inches. Since your printer probably prints 6 vertical lines to an inch, this "page length" is 9 lines. Modify the printing parameters (see Section 6.9) as follows:

Lines per page: 9

Characters per line: 85 (no need to change this, since only a single column of labels is being printed)

Characters in left margin: 8 (or another value that works for your setup)

Characters in right margin: Use CTRL-X to clear this line (it is not needed for this application)

Lines in top margin: 0

Lines in bottom margin: 0

Stop between pages? (No)

This printing system setup will work very well for the mailing label document described in Section 6.7, which is also stored on your "Tutorial Document" list under the name 'Label'.

6.12 Using PRINT FORM LETTERS to provide printouts of "linked" fields in big records, such as bibliography files

Very interesting uses can be made of List Handler's capabilities to hold large records, with large individual fields.

The following example illustrates a list that can be created to manage, select and sort large sets of bibliographic records, each of which has provisions for relatively large abstracts of the published references:

< Author >

< Title >

<Biblio. Info.>
<Key Words>
<Abstract1>
<Abstract2>
<Abstract3>
<Abstract4>
<Abstract5>
<Abstract6>
<Abstract7>
<Abstract8>
<Comment1>
<Comment2>
<Comment3>
<Comment4>
<Comment5>
<Selectcriterion1>
<Selectcriterion2>
<Selectcriterion3>
<Selectcriterion4>
<Selectcriterion5>
<Project>
<Date Entered>

Since each of the fields can hold about 200 characters, a fairly long abstract of a reference work can be entered. Start typing, of course, in <Abstract1>. When this field fills up (even in midsentence), continue typing in <Abstract2>, etc. Similarly, relatively long comments can be entered, using the <Commentn> fields sequentially.

The <Selectcriterionn> fields can be used, in the **screen search** mode, to "mark" a record as belonging to an interesting group, for example a key word search using the "search all fields" mode (while inspecting the record on screen, press CTRL-C to edit, and enter a mark in one of the 'Selectioncriterion' fields, e.g., 'arsenic'). Such marks can be used in printing routines (which are unable to do full text key word searches) to select, sort and print out the records of interest for your purpose.

The PRINT FORM LETTERS routine is the most flexible routine for printing information based on such "sequential field" records.

Here's how one could set up PRINT FORM LETTERS to print selected "full text" bibliographic citations:

Use the "Set search conditions" and "Set search order" commands to fit your purposes in selecting and ordering the records for printout.

When the "Input Document" menu appears on screen, enter a document such as this:

Author: <Author>

Title: <Title>

Source: <Biblio. Info.>

Key Words: <Key Words>

Abstract: <Abstract1> <Abstract2> <Abstract3>
<Abstract4> <Abstract5> <Abstract6> <Abstract7>
<Abstract8>

Comments: <Comment1> <Comment2> <Comment3>
<Comment4> <Comment5>

This will produce a continuous printout of the contents of the selected abstract and comment fields. Don't worry if the last several fields are empty.

Such an approach can be used to print up reference cards, summary information about a matter of interest, or whatever — with the ability to do sorts.

List Handler is so flexible that an infinite variety of such formats is available to the user to suit his particular purposes. Personnel records? Correspondence files? Laboratory data and notes on the observations? The uses are endless.

CHAPTER FOUR: PRINTING MAILING LABELS BASED UPON A LIST

7.0 USE OF THE "PRINT LABELS" PRINTING ROUTINE

One of the most universal uses of List Handler is to print selected and sorted mailing labels based upon address files maintained on one or more list disks.

The PRINT LABELS printing routine operates just like the PRINT FORM LETTERS routine, up to the point of the "Set Printout Conditions" screen menu. Because the "document" that sets up the fields and organization of a mailing label is short and simple, the "Set Printout Conditions" screen menu is the shortest and most standardized of the three printing routines. Yet it is capable of many variations and customized designs.

One of the features of the PRINT LABELS "Set Printout Conditions" menu is that it allows the user to specify the number of rows of labels to be printed across a strip of labels. Mailing labels for computer use are typically supplied as gummed labels mounted on a sheet that has perforations at each the left and right margins, so that continuous printing can be done with a "forms handler" on the printer. Labels can be obtained with from one to four labels across on such continuous strips.

The exercise below will use the "Tutorial List" as the list disk to be mounted. Each step to achieve the desired result — a printed set of selected and ordered mailing labels — is presented in streamlined fashion. As necessary, the user will be referred to earlier sections of

the manual to review steps, options and commands.

The exercise is a bit like a fireworks display. It will demonstrate some of the truly exciting possibilities and uses of List Handler. The sample list of about 400 records is large enough to show off the outstanding speed of the program, implemented on your Apple II computer.

7.1 Step one: boot List Handler and mount the “Tutorial List” list disk

These operations will quickly become familiar. Review Sections 3.1 and 3.2, if necessary.

7.2 Step two: choose the PRINT LABELS routine from the MAIN MENU

From the MAIN MENU, press ‘4’ to select PRINT LABELS.

7.3 Step three: “Set Record Selection Condition” — the records to be selected

The first available choice would be to ‘Select all records’. This would be the appropriate choice if you were to print labels for everyone on your mailing list.

However, this exercise will select a particular field (a date field), and then specify as a logical operation selection of those records that fall within a selected **range of dates**. The ARROW and RETURN keys will be used to instruct the program of the choices. (If necessary, review Sections 6.2 through 6.5.)

Select the <Expiration Date> field. Use RETURN to confirm this field and move the cursor down a line.

Select the logical relationship ‘chronologically equal to or between:’.

Type ‘9/1/82’ as the first date, and ‘9/31/82’ as the second date (in using such ranges of dates, you need not worry about whether the selected month has 28, 29, 30 or 31 days — just assume 31 to make certain the program will select all records in the specified month).

Press RETURN to confirm the conditions, and then press CTRL-N to move to the next menu.

Discussion of the search logic you have specified: These search conditions instruct the program to examine a specific field, <Expiration Date>, in all the records in the list, and to select for printing those that have expiration dates on or between September 1 through September 31, 1982. In your role as manager of subscriptions for a magazine, you might wish to print such labels to send subscribers an invitation to renew their subscriptions.

7.4 Step four: select the order (sort order) in which the labels are to be printed

Using the ARROW keys, select the <Zip Code> field, sorted in ascending alphabetical order. Confirm by pressing RETURN, and press CTRL-N to move to the next step. (If necessary, review Sections 6.6 and 6.3 2), 3), and 4).)

Discussion of the sort order selection: You have instructed the program to sort the selected records into increasing Zip Code order. This might be done to take advantage of bulk mailing rates. Note that, because the sort is alphabetical rather than numerical, it can handle mixed 5-digit and 9-digit Zip Codes in proper order!

7.5 Step five: enter the document (the content and organization of the labels)

This is the document you will enter:

<Last Name, First Name>
<Address>
<City, St.>
<Zip Code>

each field must be typed **exactly** as it appears, if your document is to communicate correctly with the list that has been mounted.

Press CTRL-F. This remarkable command places on the screen the first field name, without your having to remember it. The screen will display '<Last Name, First Name>'. Press RETURN to confirm that this field is to be selected, and that it is to be the only field on the first line — the cursor will then drop down a line. (If necessary, review Section 6.7.)

When your document is completed, press CTRL-N to move to the next step.

Note: This document is also available on the "Tutorial Document" disk under the name 'Tutorial List Label'. You may find it convenient to create frequently used documents, using Word Handler or another word processing program that produces text files (*not* binary files such as are produced, for example, by Apple Writer™), and stores them on disk. You can then use the CTRL-L command, enter the name of the stored document, and proceed. (See Section 6.8.)

7.6 Step six: 'Set Printout Conditions'

The menu will display the page parameters for printing your labels, with pre-set "default" values:

Labels across page: 1
Characters in left margin: 8
Label width: 30
Label height: 8
Stop between label rows? No

The RETURN key can be used to "walk" down the screen to each of these options. (See Sections 6.9 and 6.11 for useful discussions of some of the options.)

For the purposes of this exercise, set 'Labels across page:' to '3'. Leave the others unchanged.

Press CTRL-L to move on. Follow all the screen prompts, being certain that your printer is turned on and has paper (note the suggestion on use of ordinary fanfold paper for this exercise in Section 7.7), when prompted to do so. Please observe the CAUTION in Section 6.8, about making certain the proper disk is in the primary drive at each step.

7.7 Step seven: your experimental labels

To conserve expensive label forms while experimenting, you may use ordinary fan-fold paper, as is suggested for this exercise.

See **Figure 3** for an actual printout of the exercise.

**7.8 Step eight: press CTRL-E to return to MAIN MENU
for exit when finished**

Ford, Lawrence
3535 Trimble Rd .
Philadelphia, Pa.
19104

Adams, David
6825 King Rd .
Richman, Va.
23232

White, George
4887 Trimble Av.
Memphis, Tn.
38101

Knight, Sylvia
748 Elm Ct.
Fort Wayne, In.
46802

Evans, David
8995 Reed Rd .
Kansas City, Mo.
64108

Duvall, Thomas
203 Clay Av.
Kansas City, Mo.
64108

Jones, Elizabeth
3596 Laurel Rd .
Tulsa, Ok.
74101

Blake, Brenda
4579 Alamo Ct.
Houston, Tx.
77013

Lee, Frances
8188 Laurel Av.
Los Angeles, Ca.
90052

White, Veronica
9100 Dolphin Rd .
Los Angeles, Ca.
90052

Reed, Sylvia
1741 Elm Rd .
San Francisco, Ca.
94101

FIGURE 3
Actual printout of the mailing label exercise



CHAPTER FIVE: PRINT LISTS AND SIMPLE COLUMNAR REPORTS

8.0 USES OF THE "PRINT LIST" ROUTINES

The PRINT LIST printing routine shares the procedures for setting search conditions, selecting order (sort) of records, and document input with the PRINT FORM LETTERS and PRINT LABELS routines.

The printing parameters in the 'Select Printout Conditions' mode are intermediate between those of PRINT FORM LETTERS and PRINT LABELS. These parameters can be modified to permit many different types of printed output.

In general, the PRINT LIST option should be selected for relatively complex mailing list formats (such as in the exercise below, which includes multiple **field names** on a label line).

The PRINT LIST option should generally be selected for printing columnar reports, which will also be demonstrated as an exercise in this chapter.

9.0 PRINT A "COMPLEX" LABEL BASED ON "SUBSCRIPTION MAILING LIST"

The mailing label demonstrated in this exercise may not work properly if it is printed using the PRINT LABELS routine. The latter routine sometimes produces "gaps" or "overwrites" when more than one field is entered on the same line.

The PRINT LIST option can easily handle such multiple field lines,

although, it is true, at the expense of giving up the ability of PRINT LABELS to print multiple rows of labels.

9.1 Step one: boot List Handler and mount “Subscription Mailing List”

Follow the standard procedures described in Sections 3.1 and 3.2.

9.2 Step two: choose the PRINT LIST option from the MAIN MENU

From the MAIN MENU, press ‘5’ to select PRINT LIST.

9.3 Step three: “Set Record Selection Condition” — the records to be selected

The first available choice would be to ‘Select all records’. This would be the appropriate choice if you were to print labels for everyone on your mailing list.

However, this exercise will select a particular field, <Credit?>, and will set the condition that the records selected will alphabetically match ‘y’ as the content of this field. (This could be considered as preparation of address labels to accompany the form letters prepared in Section 6. Review the steps used in Section 6.3, 6.4, and 6.5 if necessary.)

The ARROW and RETURN keys will be used to make and confirm the choices.

Select the field <Credit?>. Press RETURN to move the cursor down a line, and confirm that the logical condition ‘alphabetically equal to:’ is correct, by pressing RETURN.

Enter ‘y’ as the content of the field named <Credit?>, and press RETURN to confirm this choice.

Press CTRL-N to move to the next step.

9.4 Step four: select the order (sort order) in which the labels are to be printed

Using the ARROW keys, select the <Zip Code> field, sorted in ascending alphabetical order. Confirm by pressing RETURN, and

press CTRL-N to move to the next step. (If necessary, review Sections 6.6 and 6.3 2), 3), and 4).)

9.5 Step five: enter the document (the content and organization of the labels)

This is the document you will enter:

<Hon> <First> <Last Name>
<Title>
<Company>
<Address>
<City>, <State> <Zip Code>

You may recognize this as the same label document as that done as an exercise in Section 6.7. Review that exercise, if necessary.

Note: This label document is present on your "Tutorial Document" disk, under the name 'Label'. If desired, you may enter it using the CTRL-L (load document from disk) command. If so, review Section 6.8.

9.6 Step six: 'Set Printout Conditions'

The menu will display the page parameters for printing your list (in this case, labels), with pre-set "default" values.

Lines per page: 66
Characters per line: 80
Characters in left margin: 8
Lines in top margin: 6
Lines in bottom margin: 6
Stop between pages? No

You may wish to review Sections 6.9 and 6.11 on the selection and use of these parameters.

Set the parameters to match these values for your mailing label printout:

Lines per page: 8 (or 9, depending on the height of your labels)

Characters per line: 35 (depending on the width of your labels)

Characters in left margin: 8 (you may wish to experiment)

Lines in top margin: 0

Lines in bottom margin: 0

Stop between pages? No

Press CTRL—N to move to the next prompt — and follow the screen prompts carefully. Be certain to turn on the printer and have paper in it.

To conserve expensive labels, use ordinary fan-fold paper for this exercise.

9.7 Step seven: your experimental labels

See Figure 4 for an actual printout of labels from this exercise.

9.8 Step eight: press CTRL-E to return to MAIN MENU for exit when finished

10.0 PRINTING A SIMPLE COLUMNAR REPORT

This exercise will use “Tutorial Mailing List” as the list from which information is drawn in a structured and useful way.

Although List Handler does not have provisions for printing “headers” (column titles) on your report, these can easily be added by typewriter.

10.1 Step one: boot List Handler and mount “Tutorial Mailing List”

Review the procedures in Sections 3.1 and 3.2, if necessary.

10.2 Step two: select the PRINT LIST option from the MAIN MENU

Select PRINT LIST by typing ‘5’.

10.3 Step three: "Set Record Selection Condition" — the records to be selected

The first available choice would be to 'Select all records'. This would be appropriate if you want to print out a report about everyone in your list.

However, this exercise will select a particular field, <Expiration Date>, and will specify the logical condition 'chronologically equal to or between:' 9/1/82 and 9/31/82.

Since this is the same set of selection specifications used in Section 7.3, you may review the procedures used there, if necessary.

10.4 Step four: select the order (sort order) in which the report is organized

Using the ARROW keys, select the <Expiration Date> field. Press RETURN, and use the ARROW keys to select the order 'chronologically in ascending order'.

Discussion of the sort order: You are requesting the report to be printed out in ascending order of expiration dates. That is, the earliest expiration dates will be printed first.

10.5 Step five: enter the document

This is the document you will enter:

<Last Name, First Name> <Expiration Date> <Phone Number>

Use CTRL-F to enter the field names, as in the earlier exercises.

Discussion of the "tabbing" features used in spacing: List Handler will tab between field names entered on the same line, if there are at least three spaces between the field names. However, the length of the actual entries in the fields also is important. In this case, we assume that no actual entry (person's name) in the <Last Name, First Name> field is longer than 30 characters. We find that the field name itself is 21 characters long; so we add 9 characters, and then another 3 spaces before typing the next field name on the line.

Press CTRL-N to move to the next step.

Set these values:

Lines per page: 2
Characters per line: 85
Characters in left margin: 8
Lines in top margin: 0
Lines in bottom margin: 0
Stop between pages? No

This will produce a neatly double-spaced report. **Note:** the print routine will “freeze up” if the line width is set too short.

Press CTRL-N to move to the next step.

10.7 Step seven: your report

See **Figure 5** for actual printout of the exercise.

This is the kind of report that might be useful if you were a magazine subscription editor, and wished to put together a quick report on the subscribers whose subscriptions expire during a particular month. To support a phone campaign to encourage renewals, you have also added a column for phone numbers. (To assist your phone “boiler room” personnel, you could easily sort the report differently, to produce a phone area code sort.)

10.8 Step eight: press CTRL-E to return to MAIN MENU for exit when finished

Mrs. Brenda M. Knight
Senior Analyst
Boggs, Boggs and Boggs, Inc.
2486 Elm Rd.
New York, NY 10451

Representative H. P. Thistle
Congressman, 1st District ME
U. S. Congress
102 Cannon Office Building
Washington, DC 20020

Mr. William C. Parker
Chairperson
Hoosier Birdwatchers' Club
2374 Virginia Ct.
Indianapolis, IN 46206

Mrs. Ursula S. Martin
President
Kansas Jayhawks
9672 Virginia Lane
Kansas City, MO 64108

Mr. William P. Howard
President
Acme Brick Co.
1241 Airline Hwy.
Baton Rouge, LA 70815

FIGURE 4

Actual printout of labels using PRINT LIST

Evans, David	9/3/82	(816) 413-2267
Lee, Frances	9/4/82	(213) 548-6338
Jones, Elizabeth	9/5/82	(918) 951-4915
Duvall, Thomas	9/7/82	(816) 409-8062
Knight, Sylvia	9/10/82	(219) 516-4597
Reed, Sylvia	9/11/82	(415) 890-8927
Ford, Lawrence	9/14/82	(215) 758-1312
White, Veronica	9/22/82	(213) 640-2986
White, George	9/23/82	(901) 287-2308
Adams, David	9/23/82	(804) 443-6016
Blake, Brenda	9/25/82	(713) 704-6503

FIGURE 5

Actual printout of a report using PRINT LIST

CHAPTER 6: THE UTILITY PROGRAMS, AND CLOSING TIPS AND COMMENTS

11.0 A BRIEF REVIEW OF THE FUNCTIONS OF THE LIST UTILITY

The List Utility programs are on the reverse side of the List Handler master program disk. These eight programs are useful tools.

11.1 Option 1: BACK UP LIST

This utility makes it very easy to back up your important list disks. You will need a new disk, or a disk containing no longer needed information to receive the backup file.

Simply follow the prompting by the menu. **CAUTION:** *Be certain not to accidentally erase your program disk. Make sure that you know which disk is in what drive!*

11.2 Option 2: CREATE NEW LIST

The functions of this program have already been covered in Section 2.0.

11.3 Option 3: EXTEND OLD LIST ONTO NEW DISK

Congratulations. By the time you need this utility, you will have filled up — since you should exercise caution — **nearly** filled up your first list disk. It is a good idea to have a second disk ready, created with this simple utility. Observe the cautions previously given about

not accidentally ruining a useful disk by writing over it. Simply follow the menu prompts, one by one.

As your list grows onto multiple disks, you can continue to have all your information on-line if you have multiple disk drives. Even a single-drive system can take advantage of many of the powers of the List Handler, where the list has grown onto two or more list disks.

11.4 Option 4: CHANGE FIELD NAMES

Nothing can be more certain than that, during use, you will find that your original design of a list needs modification.

The CHANGE FIELD NAMES utility makes it a simple matter to change the name of any of your existing fields, even though they already may have lots of data in them. Simply follow the prompts (and first make a backup copy of your list disk(s) before using this utility).

11.5 Option 5: ADD NEW FIELDS TO LIST

As with Option 4, this utility provides great flexibility in adding new fields to an already existing list. First make a backup, and then follow the menu prompts.

11.6 Option 6: DELETE OLD FIELDS FROM LIST

This useful option completes the arsenal of utility programs that will let you completely redesign a list in mid-course. Again, take the precaution of first making a backup, and then follow the menu prompts.

11.7 Option 7: CONVERTING LIST DATA TO AND FROM DIF

This utility provides two-way communications with many other programs that are available for your Apple, and that use the DIF™ (Data Interchange Format) that is becoming something of a standard.

However, DIF has not really been fully standardized, so that the user may need some knowledge of BASIC programming to enter into full communications with other programs.

The List Utility DIF program works well in taking data from other

programs such as VisiCalc™ and DB Master™. These programs are capable of producing DIF files that can be read by the List Utility.

You may also use this utility to allow exchange between your own lists. To do so, the two lists must have exactly the same field names.

11.8 Option 8: CONVERT BETWEEN TEXT AND WORD HANDLER FILES

This option is particularly useful for those who have the outstanding Word Handler word processing program. It allows conversion of documents between Word Handler and other word processing programs that produce DOS 3.3 text files.

This option can also be used to convert Word Handler documents to standard text files for transmission over telephone lines, using a modem. (And, obviously, for converting such files received over a modem into Word Handler documents.)

12.0 SOME FINAL TIPS ON SUCCESSFUL USE OF LIST HANDLER

Only one list can be created on a single list disk. While this might at first seem a disadvantage, remember that List Handler was designed to handle your information management needs quickly and easily for lists that contain hundreds to many thousands of records. This is where use of a computer pays off. It would really be too much trouble to look up a file containing only one or two — or twenty — records by computer.

With a little thought, however, it is easy to design a single list structure that can handle a number of different kinds of information on the same disk. The flexible size and structure of List Handler fields and records can adapt to holding many different kinds of information — up to 255 fields in a record. And you can always add new fields to an existing list, to take in some new wrinkle of information storage.

12.1 Use the MOUNT LIST DISK(S) option whenever a second and different list is mounted

Use of the MOUNT LIST DISK(S) option from the MAIN MENU: As you develop several different lists for your needs, the time

will come when you will want to swap from one to another.

Strange and wonderful things will happen if you change the list disks you have previously mounted, for a new set, unless the MOUNT LIST DISK(S) option is used. For, although List Handler will be able to "read" a changed list, it will continue to use the former sequence of field names on the new list! This can cause confusion and consternation. Avoid it by remounting the disks with Option 6 from the MAIN MENU.

12.2 General tips on troubleshooting in printing routines

Sometimes, when attempting a new strategy for doing a printing routine, nothing seems to happen when you instruct the printer to start printing.

This can happen when the 'Printout Conditions' are not properly set for the printed output. Perhaps the line length that has been specified is too short to hold the requested information; or perhaps the requested information consists of more lines of text than have been allowed for in the 'Printout Conditions'.

In many cases, pressing CTRL-Z will bring a document up on the screen, confirming that the search strategy did work. Go back and experiment with the 'Printout Conditions' — perhaps doing some calculations on the line lengths you have requested, or examining the number of lines to be printed, during 'Document Input'.

12.3 Support services from Silicon Valley Systems, Inc.

Silicon Valley Systems, Inc. stands ready to provide assistance by phone or mail, to help you get maximum use from List Handler.

Simply call (415) 593-4344, or write to:

Silicon Valley Systems, Inc.
1625 El Camino Real, Suite 4
Belmont, CA 94002

Be certain to fill out and send in your user registration and warranty card, so that you can receive prompt notices of program updates and other new developments.

APPENDIX A:

MULTIPLE DISK DRIVE CONVENTIONS

List Handler will recognize up to eight list disks mounted on disk drives, at one time. List disks are mounted according to the procedures discussed in Section 3.2. The following table provides the conventions for assigning list disk numbers:

List Handler Drive Number	Disk Controller Card Slot Number	Drive Number In Controller
1 ("primary")	6	1
2	6	2
3	5	1
4	5	2
5	4	1
6	4	2
7	3	1
8	3	2

Your Apple manual or local computer store can identify the slot numbers in your computer for installation of the disk drive controller cards.

APPENDIX B:

DOCUMENTATION ON THE EXERCISES

To assist the user, several of the documents available on the "Tutorial Document" disk are provided with comments on how they can be used as exercises.

DOCUMENT 1: ANOTHER COLUMNAR REPORT

Demonstration columnar report included on the Tutorial Document disk:

Name of document: Tutorial Report

Illustrated Use: Generation of a simple columnar report on the Tutorial List; organizes a selected list of subscribers whose expirations expire within a given range of dates, and provides phone numbers for contact.

Use with "Tutorial List"

Select criterion: With "Tutorial List" mounted, set the field to <Expiration Date>, set chronological selection between 10/1/82 and 10/31/82.

Sort order: Demonstration (1) — set the field to <Expiration Date> and set the sort order to ascending chronological order to generate a report showing those subscriptions that expire first. Demonstration (2) — select the <Phone Number> field, set order to

ascending alphabetical order, to organize a list for easy calling by area code.

Printing modes to be used: (1) PRINT FORM LETTERS;
(2) PRINT LABELS.

Document input: Press CTRL-L, type 'Tutorial Report', place "Tutorial Document" in primary drive.

Modifications to the printout conditions parameters:

For use with PRINT FORM LETTERS, set to:

Lines per page: 1
Characters per line: 95
Characters left margin: 8
Characters in right margin: 0
Lines in top margin: 0
Lines in bottom margin: 0
Stop between pages? No

For use with PRINT LABELS, set to:

Labels across page: 1
Characters left margin: 10
Label width: 80
Label height: 1
Stop between pages? No

Text of the report format as it appears on the Tutorial Document disk:

< Last Name, First Name > < Expiration Date > < Phone Number >

COMMENT: This report was done using PRINT LIST in the exercise in Chapter Five. As these alternative formats show, it will also work (perhaps even more easily) in the other two formats.

DOCUMENT 2: A MAILING LABEL

Demonstration label format included on the Tutorial Document disk:

Name of document: Tutorial List Label

Illustrated Use: Rapid generation of sorted (e.g., Zip Code sort) mailing labels from the 400-record Tutorial List.

Use with "The Tutorial List."

Select criterion: Demonstration (1) — Select "All records". Demonstration (2) — Set field to <Expiration Date>, set chronological range between 9/1/82 and 9/31/82 (a remarkable demonstration).

Sort order: Select the <Zip Code> field, choose ascending order for numbers.

Document input: Press CTRL-L, type 'Tutorial List Label', insert "Tutorial Document"

Text of the mailing label format as it appears on the Tutorial Document disk:

<Last Name, First Name>

<Address>

<City, St.>

<Zip Code>

COMMENT: To see how fast List Handler really is, try a printout using the 'Select all records' choice, and the Zip Code sort.

DOCUMENT 3: A MORE COMPLEX LABEL FORMAT

Demonstration label format included on the Tutorial Document disk:

Name of document: Label

Illustrated Use: Generates mailing address labels to go with the form letters "Free Renewal" and "Renewal Invoice."

Use with "Subscription Mailing List"

Select criterion: *Use the same select criterion as used for the form letter (either "Free Renewal" or "Renewal Invoice").*

Sort order: Select the <Zip Code> field, choose ascending order for numbers.

Document input: Press CTRL-L, type 'Label', and insert the "Tutorial Document" disk.

Companion form letter documents on the Tutorial Documents disk: "Free Renewal" and "Renewal Invoice."

Text of the label format as it appears on the Tutorial Document disk:

<Hon> <First> <Middle> <Last Name>
<Title>
<Company>
<City>, <State> <Zip Code>

Printing conditions: For PRINT LIST, set to:

Lines per page: 8
Characters per line: 35
Characters in left margin: 8
Lines in top margin: 0
Lines in bottom margin: 0
Stop between pages? No

COMMENT: Will also work well with PRINT FORM LETTERS with modified printing conditions.

DOCUMENT 4: A FORM LETTER

Demonstration form letter included on the Tutorial Document disk:

Name of document: Free Renewal

Illustrated Use: Generation of form letters to recipients of free subscriptions to "<Periodical>."

Use with "Subscription Mailing List"

Select criterion: Select <Credit?> field, search for either the word(s) or character(s) "y" in this field.

Sort order: Select the <Zip Code> field, choose ascending order for numbers.

Companion mailing label document on Tutorial Document: Label

Document input: Press CTRL-L, type 'Free Renewal', insert "Tutorial Document" disk.

Text of the form letter as it appears on the Tutorial Document disk:

MAMMOTH PUBLISHING COMPANY, INC.

1313 Fifth Avenue, Suite 13
New York, NY 10450
(212) 755-1212

August 8, 1982

<Hon> <First> <Middle> <Last Name>
<Title>
<Company>
<Address>
<City>, <State> <Zip Code>

Dear <Hon> <Last Name>:

It is a pleasure to inform you that your subscription to "**<Periodical>**," which expires **<Expiration Date>**, is being extended an additional year.

Normally, the renewal billing for "**<Periodical>**" would be \$**<Renewal Billing>**.

Your subscription is being renewed at no charge, because of your valued support and assistance.

I hope that in your capacity as **<Title>** of **<Company>**, you will continue to benefit from the news and articles provided by "**<Periodical>**."

Sincerely,

B. Warren Smyth
Subscriptions Manager

DOCUMENT 5: ANOTHER FORM LETTER WITH DIFFERENT SELECTION FROM THE SAME LIST

Demonstration form letter included on the Tutorial Document disk:

Name of document: Renewal Invoice

Illustrated Use: Generation of form letters invoicing renewal billings for subscriptions to "<Periodical>."

Use with "Subscription Mailing List"

Select criterion: Select <Credit?> field, search *not equal to* (either) the word(s) or character(s) "y" in this field.

Sort order: Select the <Zip Code> field, choose ascending order for numbers.

Companion mailing label document on Tutorial Document: Label

Document input: Press CTRL-L, type 'Renewal Invoice', and insert the "Tutorial Document" disk.

Text of the form letter as it appears on the Tutorial Document disk:

MAMMOTH PUBLISHING COMPANY, INC.

1313 Fifth Avenue, Suite 13
New York, NY 10450
(212) 755-1212

August 8, 1982

<Hon> <First> <Middle> <Last Name>
<Title>
<Company>
<Address>
<City>, <State> <Zip Code>

Dear <Hon> <Last Name>:

Your subscription to "<Periodical>" expires <Expiration Date>.

To prevent any delays in continued delivery of "<Periodical>," we are offering the opportunity of a convenient renewal of your subscription at the special annual rate of only \$<Renewal Billing>. This represents a discount of at least 22% from the newsstand price of <Periodical>.

If you wish to take advantage of this offer, please fill out the enclosed renewal form and slip it into the post-paid envelope.

I hope that in your capacity as <Title> of <Company>, you will continue to benefit from the news and articles provided by "<Periodical>."

Sincerely,

B. Warren Smyth
Subscriptions Manager



